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eRequisition Overview

This process guide provides instruction on the functional steps to create an eRequisition containing a catalog item. An eRequisition is a requisition that is created electronically. Catalog items signify that the items are on term contract with the state and can be Statewide Term Contracts, IT Convenience or Agency Convenience Contracts.



An eRequisition is created when a user selects items to order over the Internet through NC EProcurement @ Your Service. The user initiating the eRequisition is referred to as the requestor. A Shortcut Menu on the left hand side of the E-Procurement Home Page displays the required process steps as well as noting the user's progress. The user navigates through the process steps by either clicking the links in the Shortcut Menu or by using the navigational buttons at the top or bottom right of the screen. There are three main steps required to create an eRequisition:

1. **Add Title** – enter a title that describes the purchase
2. **Add items** – select and add items to the shopping cart
3. **Checkout** – enter shipping, accounting, and comment information, as well as review the eRequisition for accuracy

The Home Page, shown above, is the first page displayed once a user logs into the NC E-Procurement System. This page is also referred to as the Swoosh page. To begin an eRequisition, click the **'Create'** button on the Swoosh or the **'Create'** link in the Shortcut Menu.

1.0 Add Title

The Add Title page is the first step in creating an eRequisition. It allows the user to name the eRequisition for future reference.

1. **Title** -- The title of the eRequisition should be descriptive of the item(s) being purchased.
2. **Pre-Encumbrance Status** (NCAS users only) – This field indicates the pre-encumbrance status of an eRequisition in NCAS. An eRequisition is 'Not Encumbered' until the eRequisition has been sent to NCAS to pre-encumber the designated amount.

Note: Once a user submits the eRequisition, the information is sent to NCAS to pre-encumber the designated amount of the purchase. The Pre-Encumbrance Status reflects whether the eRequisition has been pre-encumbered. When the eRequisition becomes a purchase order, the money will be fully encumbered in NCAS.

3. **On Behalf Of** (NCAS users only) – The 'On Behalf Of' field will default to the requestor's login token. To create an eRequisition on behalf of another user, locate the user's name in the dropdown box.

Note: If the user's name does not appear in the dropdown box, choose **'Other...'** to select the appropriate user.

4. **Delay Purchase Until** (NCAS users only)– The ‘Delay Purchase Until?’ field allows the eRequisition to be submitted and approved but not be distributed to the supplier until the date specified.

The screenshot shows the 'Add Title' step of the eRequisition process. The form includes the following fields and options:

- Title:** Untitled eRequisition
- Pre-Encumbrance Status:** Not Encumbered
- On Behalf Of:** CORR Requestor 01
- Delay Purchase Until: ?** (calendar icon)
- *Buying Entity:** 42EG
- Transmit To Supplier?** ☒

A yellow callout box with an arrow pointing to the asterisk on the 'Buying Entity' field contains the text: "Required Fields on a page are noted with an asterisk. All other fields are optional." The form also features 'Next >' and 'Exit' buttons at the top right and bottom right.

5. **Buying Entity** (NCAS users only) -- This field will default to the buying entity defined in the user's profile.

Note: This field cannot be changed once the eRequisition has been submitted.

6. **Transmit to Supplier** (NCAS & Community College users only) – The ‘Transmit to Supplier’ box defaults to checked. The vendor **will not** receive a copy of the purchase order if this field is unchecked.

7. Click the ‘**Next**’ button to continue to the next step in creating an eRequisition.

2.0 Add Items

Users can add catalog (term contract) items to their eRequisition from the Add Items page using the catalog search functionality. The Add Items page is also used to add non-catalog items, punchout, and eQuote items to eRequisitions (covered in separate process guides).

The screenshot shows the 'Add Items' page for a requisition titled 'PR249: Untitled Requisition'. The page has a left sidebar with a 'Shopping Cart' section containing three items: 'Add Title', 'Add Items' (highlighted), and 'Checkout'. The main content area is titled 'Add Items' and shows 'Items: 1 Total: \$449.98USD'. A search bar with the text 'Keywords:' is present, with buttons for 'Search', 'Reset', and 'Options'. Below the search bar, it says '1,506 items found'. A list of categories is displayed, including 'Computers (617)', 'Manufacturing (266)', 'Miscellaneous (63)', 'Office Equipment/Supplies (358)', 'Reference Materials (796)', 'Maintenance Services (3)', 'Print (2)', and 'Uncategorized Items (4)'. A yellow box with an arrow points to the 'Options' link, stating 'Select the 'Options' link for additional search options.' Another yellow box with an arrow points to the 'Options' link, stating 'Enter keywords in search field to execute a keyword search.' A third yellow box with an arrow points to the 'Options' link, stating 'Browse the loaded catalogs by choosing the appropriate link to view a complete list of items by NIGP code.' At the bottom, there is a link to 'Create Non-Catalog Item' and a 'How To' link. Navigation buttons '< Prev', 'Next >', and 'Exit' are visible at the top right and bottom right.

Users can search the term contract catalog in three ways: Keywords Search, Advanced Search (Options), and Browsing the Catalog.

1. **Keywords** – Allows the user to type in key words that describe the item they wish to purchase into the search field. The system will then search through all the contracted items and display the items similar to the keyword search. The keyword search is intended to be the most frequently used search.
2. **Options** –Allows users to customize the search function by selecting additional fields to include in the search:
 - **Keywords:** Choose to match the keyword(s) entered by the exact phrase or exact words.
 - **Additional Options:** Select the desired field and enter the search criteria. Available options include: Supplier, Supplier Part #, Manufacturer, Mfg. Part #, Price, and ETA (Days).
 - **Custom:** Choose 'Favorites' to view the list of items saved in the favorites list. (See '6.0 Catalog Item Favorites' for additional details).
 - **Views:** Select to show or hide all available search options.
 - **Saved Searches:** Run a saved search by clicking the name of the search previously saved. To save a new search, choose 'Other'. (See '7.0 Catalog Saved Searches' for additional details).

3. **Browsing the Catalog** – Allows the user to manually drill through the National Institute of Government Purchasing (NIGP) commodity code structure to find a desired item. Click on the appropriate header (or detailed) link to view a list of the items in a particular category.

The screenshot displays the 'eRequisition' interface. On the left is a sidebar with a shopping cart icon and three numbered links: '1 Add Title', '2 Add Items' (highlighted), and '3 Checkout'. The main content area shows a search for 'PRDEV1000402: Untitled eRequisition' with 'Items: 1' and a 'Total: \$746.86USD'. A yellow callout box points to the 'View By' dropdown menu, stating: 'Sort the results using the 'View By' drop down box.' The search results show '12 items found' and a list of items. A yellow callout box points to the 'Supplier' link for the first item, stating: 'Click the 'Supplier' link to view detailed information about the selected supplier.' The first item is '(Statewide, Recycled, Good, Regular) Test item 1.' with a price of '\$698.00USD / each' and an 'Add to Cart' button. The second item is '(IT Convenience, non-Recycled, Service, Regular, ...)' with a price of '\$10.48USD / each' and an 'Add to Cart' button. The third item is '(Agency Specific, non-Recycled, Good, Base) Test ...' with a price of '\$116.88USD / each' and an 'Add to Cart' button. The interface also includes a 'Create Non-Catalog Item' button and navigation links like '< Prev', 'Next >', and 'Exit'.

4. When a user executes a catalog search, a list of items is returned. The default display of results is based on relevance. Search results can also be viewed by: category, supplier, or price.
5. Click the **'Add to Cart'** button to add the item to the shopping cart.

Note: Users can customize the search results by selecting the appropriate view in the 'View By:' and "with" drop down boxes. Search results can be displayed with detailed or summary information. Users can also view results using 'Details (multi)' or 'Summary (multi)' which allows multiple line items to be added to the shopping cart at once.

6. Select 'Details (multi)' to view the results with detailed information and add multiple line items to the shopping cart at once.

8 items found View By: Category with **Details (multi)**

Add to Cart

1 items found in: TECHNOLOGY ITEMS > COMPUTERS AND RELATED ITEMS > 204-00: COMPUTER HARDWARE AND PERIPHERALS FOR MICROCOMPUTERS > **204-60: Monitors, Color and Monochrome (CGA, VGA, SVGA, etc.)**

☐ Qty: 1 Adapter Power Mac/Monitor DB15F/HDI45M \$42.95USD / each

Contract ID: Adapter Power Mac/Monitor DB15F/HDI45M Add to Favorites

Supplier: JCN Technologies

Supplier Part #: AD4515D

ETA (Days): 3

7 items found in: Uncategorized Items [More items...](#)

☐ Qty: 1 MultiSync MT600 LCD Projector \$2.00USD / each

Contract ID: MultiSync MT600 LCD Projector Add to Favorites

Supplier: 3M HEALTH CARE PRODUCT

Supplier Part #: MT600

ETA (Days): 10

7. Place a checkmark in the checkbox beside each line item that you wish to add to the shoppingcart and click the '**Add to Cart**' button. Each line selected will now be added to your shopping cart.

Note: To view additional supplier information, click the supplier name link.

Review Details for Supplier

These are the details for the field you selected.

[How To](#)

Supplier Name: Maverick's Surf Shop

Customer ID:

Corp. web site:

Notes:

Preferred Currency: (no value)

Dispatch:

Carrier:

Carrier Method:

Terms of Payment:

Locations: [Andrea Coor : SUNNYVALE](#)

The **Review Details for Supplier** page is displayed with detailed information for the selected supplier. To view location information, click the location name listed.

Review Details for Andrea Coor : SUNNYVALE

These are the details for the field you selected.

[How To](#)

Name: Andrea Coor : SUNNYVALE

ID: 99

Contact: Andrea Coor

E-mail:

Phone: (650) 390-1000

Fax: +1 (650) 390-1100

Preferred Ordering Method: Electronic Ordering

The contact name, email address, phone number, and fax number can be viewed by selecting the appropriate location. Users can also view how the supplier receives purchase orders (e.g. fax, email, or ASN)

The screenshot shows the 'eRequisition' interface. On the left, a sidebar contains a navigation menu with '1 Add Title', '2 Add Items' (highlighted), and '3 Checkout'. The main area shows a search for 'PRDEV1000402: Untitled eRequisition' with 1 item and a total of \$746.86USD. Below the search bar, it indicates '12 items found' and 'View By: Category with Details'. A list of items is displayed, including '3 items found in: EDUCATIONAL & ATHLETIC EQUIPMENT, SUPPLIES > EDUCATIONAL EQUIPMENT AND SUPPLIES > 785-00: SCHOOL EQUIPMENT AND SUPPLIES > 785-55: Engineering and Technical Instruction Equipment and Materials (For Air Conditioning, Electronics, Machine Shop, etc.)'. The items list includes details like 'Term Contract: 123 B', 'Supplier: AFP INDUSTRIES, INC.', and 'ETA (Days): 21'. Four callouts with yellow boxes and arrows point to specific icons: 'Contract Icon' points to a document icon, 'Recycled Content Icon' points to a recycling symbol, 'HUB Icon' points to a 'HUB' label, and 'Distributor Icon' points to a 'DIST' label.

Note: There are several icons that may be listed to catalog line items indicating additional information.

- **Recycled Content Icon:** Indicates the item is made from recycled materials.
- **DIST Icon:** Indicates the item is supplied by a distributor. Once the item is added to the shopping cart, users will need to select the appropriate distributor through the supplier field.
- **HUB Icon:** Indicates the item is supplied by a registered Historically Underutilized Business (HUB).
- **Contract Icon:** Provides a link to the state term contract. Click on the link to display the state contract in a new browser window.

PR8578605: Untitled eRequisition
 Items: 1 Total: \$30.24USD

View Line Items

This is a summary of the items currently listed on your eRequisition. You can change any editable field and click **Update Total** to recalculate the eRequisition total. To add more items, click **Add Items**.

[How To](#)

No.	Type	Description	Supplier Part Number	Qty	Unit	Price	Tax	Other	Amount
1		HP 16A Photo Inkjet Cartridge For Deskjet/...	C1816A	1	each	\$30.24USD	\$0.00USD	\$0.00USD	\$30.24USD

[Edit](#) [Copy](#) [Delete](#) [Add items](#)

☐ Don't show this page again after adding item(s) (reset in preferences).

Total Cost: \$30.24USD
[Update Total](#)

[Back to Catalog](#) [Summary](#)

Note: The View Line Items page is automatically displayed after an item is added to the eRequisition. Check the **'Don't show this page again after adding item(s) (reset in preferences)'** checkbox to prevent the shopping cart from displaying each time items are added. Once this option is selected items will be added to the shopping cart, but the user will remain on the 'Add Items' screen.

- Click the **'Back to Catalog'** button to return to the Add Items page to select additional items for the eRequisition.

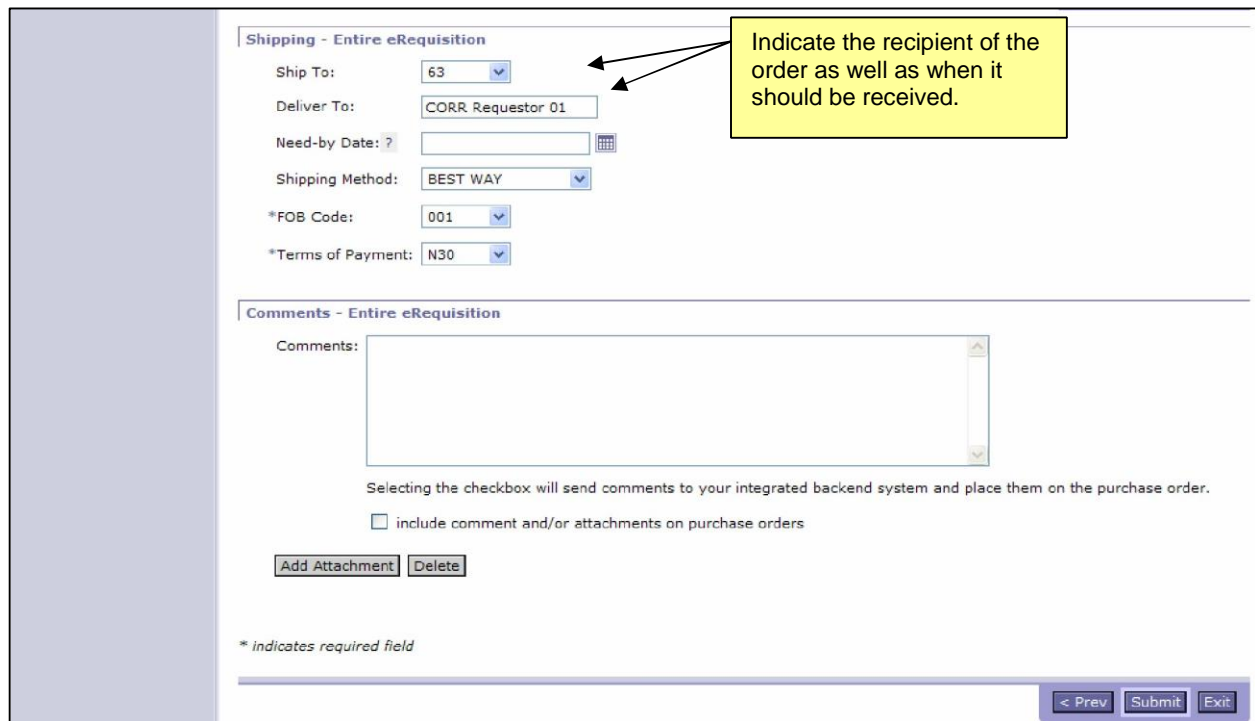
3.0 Checkout

The Checkout page allows the user to enter shipping, accounting, and comment information, as well as review the eRequisition for accuracy. The approval flow for the eRequisition can be viewed from the Approval Tab on the Checkout page as well.

The screenshot shows the 'Checkout' page for an eRequisition. The page title is 'PR249: Untitled Requisition' with 'Items: 1 Total: \$449.98USD'. The left sidebar has three tabs: '1 Add Title', '2 Add Items', and '3 Checkout' (selected). The main content area has a 'Requisition' header with 'Approval Flow' and 'How To' links. Below this is a form for 'Untitled Requisition' with a dropdown for 'Thomas Woods' and a 'Use Until?' field. The 'Line Items' section shows one item: 'Canon PC940 Copier' with quantity '1', unit 'each', price '\$449.98USD', and amount '\$449.98USD'. A red error message states: 'The line item contains one or more invalid fields'. Below the error, it lists: 'Supplier: Maverick's Surf Shop', 'Contact: Andrea Coor : SUNNYVALE', and 'Commodity Code: Photocopiers'. A detailed description of the copier is provided. At the bottom of the line item, there are buttons for 'Edit', 'Copy', 'Delete', and 'Add items'. A 'Total Cost: \$449.98USD' is shown at the bottom right. Annotations include: a yellow box pointing to the 'eRequisition' link in the sidebar with the text 'View the shopping cart by clicking the eRequisition link.'; a yellow box pointing to the 'Approval Flow' link with the text 'View the system generated approval flow by clicking the Approval Flow tab.'; and a yellow box pointing to the 'Edit', 'Copy', and 'Delete' buttons with the text 'Edit, copy, or delete by selecting the line item(s) and clicking the appropriate button.'.

1. **Line Items** -- Review the eRequisition line items on the 'Checkout' page before submitting the eRequisition. Edit, copy, and/or delete existing line items directly from this page by placing a checkmark beside the line item and clicking the appropriate button. (See the 'Editing Line Items' process guide for additional information). To add additional line items to the eRequisition, click the 'Add Items' button.

Note: Click the 'Hide Details' link to customize the amount of detailed information that is displayed on the Checkout screen.



Shipping - Entire eRequisition

Ship To: 63

Deliver To: CORR Requestor 01

Need-by Date: ?

Shipping Method: BEST WAY

*FOB Code: 001

*Terms of Payment: N30

Comments - Entire eRequisition

Comments:

Selecting the checkbox will send comments to your integrated backend system and place them on the purchase order.

☐ include comment and/or attachments on purchase orders

Add Attachment Delete

* indicates required field

< Prev Submit Exit

2. **Shipping – Entire eRequisition** – Shipping information entered will default to all line items entered on the eRequisition.

- **Ship To:** The 'Ship To' field automatically defaults to the Ship To location in the user's profile. To select a different ship to address click the drop-down box and choose the desired address. If the address name is not listed in the drop-down box, choose 'Other' for a complete list of addresses available for the entity.
- **Deliver To:** The 'Deliver To' field defaults to the user's name. To enter another name or department name do so in this free text field.
- **Need-by Date:** The 'Need-by Date' is transmitted to the vendor on the purchase order as the date that the items need to be delivered. Use the calendar icon to select the appropriate date.
- **Shipping Method:** The 'Shipping Method' field defaults to 'Best Way'. Use the drop-down box to choose the appropriate shipping method for the eRequisition.
- **FOB Code:** The Freight on Board (FOB) Code reflects how freight charges for the order are paid. Select the option meeting the user's agency purchasing policies.
- **Terms of Payment:** The 'Terms of Payment' field determines the timelines and conditions of payment to the vendor.

Shipping - Entire eRequisition

Ship To: 63

Deliver To: CORR Requestor 01

Need-by Date: ?

Shipping Method: BEST WAY

*FOB Code: 001

*Terms of Payment: N30

Comments - Entire eRequisition

Comments:

Selecting the checkbox will send comments to your integrated backend system and place them on the purchase order.

☐ include comment and/or attachments on purchase orders

Add Attachment Delete

* indicates required field

< Prev Submit Exit

3. **Comments – Entire eRequisition** – Enter header comments and/or attachments necessary to complete the eRequisition. To include a comment and/or attachment with the purchase order, select the checkbox beside, **‘include comment and/or attachment(s) on purchase orders.’**
4. **Approval Flow** – Review the system generated approval flow by clicking the Approval Flow tab. (See the ‘Approval Flow’ process guide for additional information).
5. **Submit** - To submit the eRequisition to the approval flow, click the **‘Submit’** button either at the top or bottom of the page.

4.0 Catalog Item Bundle IDs

Bundle items are items that are grouped together by the supplier. Items in the catalog that are part of a bundle will display a Bundle ID number beneath the item description. There are two types of items in a bundle: a) bundle base item and b) bundle option items – the options or choices that accompany the base item. Some of the option items may have additional costs associated with them.

The screenshot shows the 'Add Items' section of the eRequisition system. On the left is a sidebar with links: 1 Add Title, 2 Add Items (highlighted), and 3 Checkout. The main area has a search bar with 'Keywords:' and buttons for Search, Reset, and Options. Below the search bar are fields for Contract ID, Bundle ID (containing 'A3'), Supplier, and Favorites. A dashed box highlights the Bundle ID field. Below these fields, it says '15 items found' and 'Show Results: 20 per page'. The search results list two items:

- Option Item:** Lens Material, For Safety Eyewear, High Index 1.56 Plastic, Multi Vision. Price: \$34.58USD / each. Bundle ID: Bundle ID: A3 (Option Item) (Option). Buttons: Add to Cart, Add to Favorites.
- Base Item:** Lenses, For Safety Eyewear, Bifocal, Flat Top, 35 MM. Price: \$15.90USD / each. Bundle ID: Bundle ID: A3 (Base Item) (Base). Buttons: Add to Cart, Add to Favorites.

1. Conduct a keyword search by placing the Bundle ID in the keyword search field.
2. The returned search results contain the base item along with the available option items.
3. Click '**Add to Cart**' beside each item to be added to the shopping cart.
4. Complete the eRequisition as normal.

5.0 Catalog Item bForms

BForms are term contract items that have specific attributes associated with them, and the user must select a preferred option before the item is added to the eRequisition (e.g., size, color, delivery options). When a user adds a bForm item to the eRequisition, the system displays the options for the user to choose. The user should select the preferred options and click 'Next' to add the item to the shopping cart.

1. Execute a keyword search and add the item to the shopping cart. An additional screen will prompt users to select or enter additional information related to the selected item.

2. Select the necessary additional information, using the dropdown box, as indicated on the page.
3. Click 'Next' to add the item to the shopping cart.
4. Complete the eRequisition as normal.

6.0 Catalog Item Favorites

Users can add specific term contract items to a favorites list for quick reference. Catalog items saved in Favorites are updated as the catalog item is updated (e.g., price, description). To utilize catalog Favorites, users must first define 'Favorites Groups'. Specific catalog items can then be added to a defined Favorites Group.

The screenshot shows the 'Add Items' page in the NC E-Procurement system. On the left is a navigation menu with three items: '1 Add Title', '2 Add Items' (which is highlighted), and '3 Checkout'. The main content area is titled 'Add Items' and includes a sub-header 'Requisition'. Below this, there is a search bar with the text 'Keywords: copy paper' and buttons for 'Search', 'Reset', and 'Options *'. To the right of the search bar is a button labeled 'Create Non-Catalog Item'. Below the search bar, it says '2 items found' and provides options for 'Show Results: 20 per page' and 'View By: Relevance with Details'. A message states: 'The item has been added to the group "Office Supplies". Select "Office Supplies" from the Favorites pull-down list to see all items. If you do not see the Favorites pull-down list, select it under Options.' Two items are listed: 'Canon PC940 Copier' and 'Eureka Recycled Copy Paper 8 1/2" x 11", Ream'. Each item has a price, a description, and buttons for 'Add to Cart' and 'Add to Favorites'. The 'Add to Favorites' button for the Canon PC940 Copier is circled with a dashed line. Below the 'Add to Favorites' button for the Eureka Recycled Copy Paper, there is a dropdown menu with 'Office Supplies' selected and an 'Other...' option, which is also circled with a dashed line. At the bottom of the page, there is a yellow banner that says 'Can't find what you are looking for? Fill out a non-catalog form.' and navigation buttons for '< Prev', 'Next >', and 'Exit'.

1. To define a Favorites Group, execute a catalog search for the desired item.
2. Click the 'Add to Favorites' link and choose 'Other...'

The screenshot shows the 'Add Items' step of a requisition process. On the left is a sidebar with three steps: '1 Add Title', '2 Add Items' (highlighted), and '3 Checkout'. The main content area is titled '2 Add Items' and 'Requisition'. It contains instructions on adding items from a catalog or favorites groups. A dashed circle highlights a '< Back' link. A yellow callout box points to a list of favorite groups, stating: 'Use Favorite Groups to organize favorites for quick reference in the future.' The list includes a checkbox for 'Favorite Group Name' and a checkbox for 'Office Supplies', with a 'Delete Group' button below. Another yellow callout box points to the 'Delete Group' button, stating: 'Delete Favorite Groups by selecting the checkbox next to the group and clicking the \'Delete Group\' button.' At the bottom, there is a 'New group name:' field with 'Maintenance Supplies' entered, and a 'Create Group' button circled with a dashed line. Navigation buttons at the bottom right include '< Prev', 'Next >', and 'Exit'.

3. In the 'New group name' field type the name of the Favorite Group to create.
4. Click the '**Create Group**' button. The new group will appear in the Favorite Group Name list.
5. Click the '**Back**' link to return to Add Items screen.

Shopping Cart

1 [Add Title](#)

2 [Add Items](#)

3 [Checkout](#)

Items: 0 Total: \$0.00USD

2 Add Items Requisition

Add items to your requisition from the catalog or from your favorites groups. You can also enter details for non-catalog items. [How To](#)

Keywords:

2 items found Show Results: 20 per page View By: Relevance with Details

The item has been added to the group "Maintenance Supplies". Select "Maintenance Supplies" from the Favorites pull-down list to see all items. If you do not see the Favorites pull-down list, select it under Options.

<p><u>Canon PC940 Copier</u></p> <p>Supplier: Pleasant Hawaiian Travel</p> <p>Supplier Part #: 464166</p> <p>ETA (Days): 7</p>	<p>\$449.98USD / each <input type="button" value="Add to Cart"/></p> <p><input type="button" value="Add to Favorites"/></p> <p>The revolutionary PC940 has high capacity, speed and advanced zoom features you'll really appreciate. Equipped with a 250- sheet paper cassette and legal-size capability, the PC940 is suitable for high-volume productivity. It also features a rapid 13 copies-per- minute speed and a preset reduction/enlargement zoom capability, making the PC940 the ideal copier for handling all your large copy jobs.</p>
<p>★ <u>Eureka Recycled Copy Paper 8 1/2" x 11", Ream</u></p> <p>Supplier: Pleasant Hawaiian Travel</p> <p>Supplier Part #: 462966</p> <p>ETA (Days): 1</p>	<p>\$5.49USD / each <input type="button" value="Add to Cart"/></p> <p><input type="button" value="Add to Favorites"/></p> <p>Ideal for business customers that are environmentally conscious. Made of 50% post-consumer recycled material. Multi-purpose paper.</p>

Can't find what you are looking for? Fill out a [non-catalog form](#).

- To add an item to the Favorites Group, click the '**Add to Favorites**' link. Users can then add the item to the desired Favorites Group by choosing the name from the menu.

Note: Once the item has been added to the desired favorites group, a star is placed beside to item to mark it as a favorite.

7.0 Catalog Saved Searches

Users can save frequently used catalog searches for future reference. This can be helpful for users that add the same type of line items to an eRequisition on a regular basis.

The screenshot shows the 'Add Items' screen in the eRequisition system. The search criteria are 'red binders', and 4 items are found. A dropdown menu is open, showing various search options. The 'Saved searches' option is highlighted, and a dashed circle is drawn around the 'Save current search...' option.

1. On the Add Items screen, complete the catalog search to save. The results are displayed.
2. Click the **'Options'** link to view the list of available options.
3. Choose **'Save current search...'**

The screenshot shows the 'Save Catalog Search' dialog box. The 'Search Name' field is highlighted with a dashed circle, and the 'Save' button is also highlighted with a dashed circle.

4. In the 'Search Name' field enter the name of the saved search.

- Click the **'Save'** button. The catalog search is now saved and the user is returned to the Add Items screen.

The screenshot displays the 'Add Items' screen in the NC E-Procurement system. The top navigation bar includes 'Shopping Cart' and 'Add Title', 'Add Items', and 'Checkout' links. The main content area shows a search for 'Office Equipment/Supplies' with 175 items found. A dropdown menu is open, showing 'Keywords', 'Additional', 'Views', and 'Saved searches' sections. The 'Options' link in the search bar is circled, and the 'Run 'red binders search'' option in the 'Saved searches' dropdown is also circled.

- To use a saved search, click the **'Options'** link from the Add Items screen.
- Choose the saved search to execute under 'Saved searches'. The results for that search are displayed.

Note: Saved searches save the search criteria to be executed, not specific catalog items.